Job Aid for 2013 Planning Stage

Role Definitions:

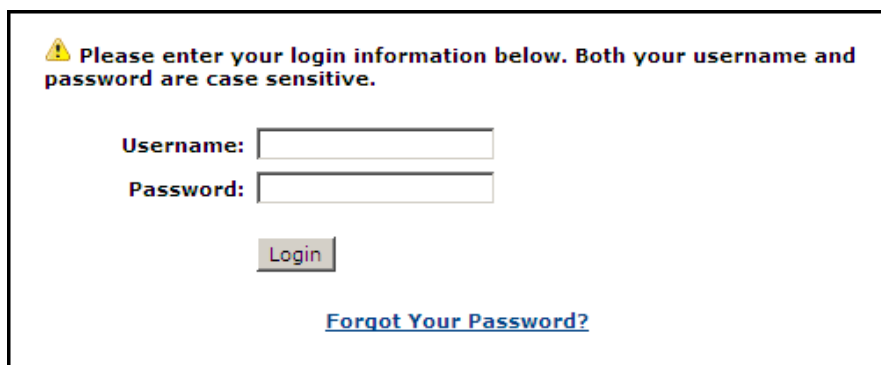**Reporting Manager:** The manager being reviewed and reports to the Appraising Manager.

Appraising Manager: Completes the review of the Reporting Manager and reports to the Reviewing Manager

Reviewing Manager: Oversees the Appraising Manager. Via the dashboard reports, the reviewing manager can review the form(s) of his or her direct reports and their managers (if applicable.)

Logging into ACES Online

1. In your Internet browser, navigate to
   https://performancemanager4.successfactors.com/login?company=MA&

Tip:	Make sure to bookmark this page for quick access on your next visit. In Internet Explorer, click on **Add to Favorites** in the Menu bar, and then click on the **Add** button.

⚠️ **Please enter your login information below. Both your username and password are case sensitive.**

Username: [   ]

Password: [   ]

[Login]

Forgot Your Password?

2. Type your Employee ID in the **Username** field.

3. Type your current password in the **Password** field.

4. Click on the **Login** button, or press the **Enter** key. The ACES welcome page opens.

ACES Form Icons
Several icons appear in the upper right corner of the 2013 form.

View option - Allows users to view full form or only one section at a time.

Spell check (entire form)

Print form   **Print Setup** (select HTML printing)

Save entire form

Job Aid for 2013 Planning Stage

⭐ **Form history** (click on this link to access a copy of previous forms such as **ACES forms from 2005 - 2012**.

📓 **Note history** (click on this link to access a copy of previous notes)

ℹ️ **"I"** - Information button; shows audit trail of where form has been and where it is going to next.

Reporting Manager Instructions

For the Planning Phase the **Reporting Manager** in consultation with his/her appraising manager enters between two and four **Manager Objectives**. The weights of the objectives must equal 100%; otherwise the form will not be able to route to progress review stage. In addition, enter between one and three **Career Growth Objectives**.

1. Click on **My Forms** to locate your **2013 ACES Form**.

2. Click on the title of the **2013 ACES Form** that you want to access.

Note:	If you cannot locate your form, please check with your Agency ACES Coordinator who can work with the ACES help team to determine why you don't have a 2013 form.

3. Review the "**Employee Information**" section. This information comes from the payroll system. If your functional title is listed incorrectly, please contact your Agency ACES Coordinator who can work on updating your title in the payroll system, and on the ACES form.

4. Review the **PLANNING STAGE INSTRUCTIONS** section to review the steps that need to be completed for this phase.
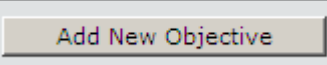
PLANNING STAGE INSTRUCTIONS

Collaborative Process: The reporting manager's ACES Form is simultaneously in <u>both</u> the inbox of the **Reporting Manager** and **Appraising Manager**. Only one party can be editing the form at a time. Both parties can view form updates instantly (after clicking on the save icon).

Save your work. Be sure to save your work every 5-10 minutes by clicking on the save icon 💾 which saves the entire form.

Reporting Manager defines 2-4 manager objectives, and enters 1-3 career growth objectives. Milestones may be entered and updated at anytime throughout the review cycle. Once your form is ready for your appraising manager to review, <u>click</u> in checkbox at the bottom of the form "**Reporting Manager – Confirm Objectives Completed**" to indicate to your manager that your objectives are ready for his/her review.

Appraising Manager reviews the objectives entered and makes any updates. Click in checkbox at the bottom of the form, **Appraising Manager – Confirm Objectives Reviewed**, to indicate to your reporting manager that you have reviewed the objectives entered. Next, <u>click</u> on **DONE** button to confirm the planning stage has been completed. The form then moves into progress review stage, where the form remains until progress reviews begin in April 2012. Please note that the Appraising Manager is the only party who can view the **DONE** button, and move the form to progress review stage.
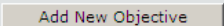
5. Go to **I. Manager Objective** section, <u>click</u> on **"Add New Objective"** [Add New Objective] to add between two and four **Manager Objectives**, to your form. **Manager Objectives** must add up to 100%.

I. Manager Objectives

I. Manager Objectives (Planning, Progress Review and Final Review)

Reporting Manager enters between 2 and up to 4 SMART (specific, measurable, achievable, realistic, and timebound) objectives. Milestones are optional and may be added and updated at any time throughout the review cycle. Assign a weight to each objective; weights of manager objectives must add up to 100%.

For additional help on entering objectives, please visit HRD's ACES 2012 Planning Stage page.

[Add New Objective]

6. A new window opens. Follow steps a) or b) below depending on whether you want to create your own objectives or choose objectives from a goal library and modify those goals to tailor them to your position.

Create a New Objective

🏷️ Choose what type of objective to add.

[➕ Management Objective]

Management Objectives allow you to make up your own objective and assign any metrics you want.

[➕ Sample Management Objective]

Sample Management Objectives are selected from an organized library with suggested metrics.

Note:	To copy objectives from previous years' forms, click on ⭐ **Form History** button to copy and paste objectives onto your form from previous years' ACES Forms.

a) <u>Click</u> on **Management Objective** button to create your own objective. <u>Enter</u> your objective text, optional milestones, and assign a weight between 0% and 75%. Then <u>click</u> on **save changes** button. The window closes and you return to your form. The objective will now appear on the form. The objective may also be edited on the form as needed. Repeat these steps until all objectives are entered.

<div align="center">

OR

</div>

b) <u>Click</u> on **Sample Management Objective** button. <u>Click</u> on the side arrow ▶ to expand the goal categories. You can then <u>click</u> in boxes to select the objective(s) you want to add to your form. Then <u>click</u> on **Add Selected Objective,** to add those objectives to your form. Enter optional milestones, and assign a weight between 0% and 75%. Then <u>click</u> on **save changes** button. Repeat these steps until all objectives are entered.

Select objective to add from the library. Click the icon to expand categories. You will be able to modify the objective in the next step.

▶ 📁 Administration
▶ 📁 Career Growth
▶ 📁 Customer Service
▶ 📁 Dept. of Industrial Accidents
▼ 📁 Finance & Accounting
  ▶ 📁 Accounting
  ▶ 📁 Audit & Compliance
  ▼ 📁 Budget
    ☑ Complete and finalize budget by (date)   Date budget is finalized
    ☑ Conduct monthly reconciliation of computer reports to operating reports   Monthly reconciliation conducted
    ☑ Forecasting of future costs accurate to __ points by (date)   Expense report accuracy
    ☐ Forecasting of future revenues is accurate to __ points by (date)   Revenue report accuracy
    ☐ Improve budget worksheet for all divisions for easier understanding by (date)   __ (#) of changes to budget worksheet

⬅ Back   ➡ Add Selected Objective   ❌ Cancel

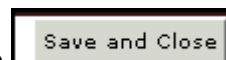| **Tip:**	If you need additional assistance on writing manager objectives, please see Writing Objectives document on the ACES 2013 Planning Stage.

7. <u>Click</u> to **II. Career Growth Objective** section to enter between one and three **Career Growth Objectives**. Navigate to page 7 step a) to create your own objectives or step b) to choose objectives from the **Career Growth Library**
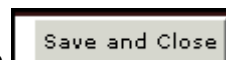

8. <u>Click</u> to **III. Core Managerial Competencies** section to review the competencies/behaviors that all managers will be evaluated on at final review stage.

9. When you have finished entering all your objectives onto the form, go to the **Reporting Manager – Confirm Objectives Completed** section, and <u>click</u> in the check box to indicate to your manager that you have finished entering objectives onto the form.

Tip:	An email will <u>not</u> be generated after clicking on **Confirmation of Objectives being Entered** button. You will need to tell your appraising manager once you have finished entering objectives onto your form.

When you are done with your form, <u>click</u> on the save and close ⬚ at the bottom of the form or <u>click</u> on **save** icon 💾 at the top of the form.

Job Aid for 2013 Planning Stage

Appraising Manager Instructions

Note:	No email notification will be generated when your reporting manager has finished entering objectives onto his/her form. There is a section at the bottom of the form, entitled **Reporting Manager – Confirm Objectives Completed,** where you can verify that your reporting manager has finished entering objectives onto his/her form.

1. Click to **My Forms**. In your **Inbox** locate the 2013 ACES Form for your direct report. Click on the title of the 2013 form to open the form.

2. Go to **Reporting Manager – Confirm Objectives Completed,** or click on link on the left side of the page to jump to that section. This check box should be selected once your reporting manager has finished working on the form and it is ready for your review.

Reporting Manager – Confirm Objectives Completed

☑ By checking here, you are confirming that you have entered your objectives, optional milestones and ready for your appraising manager to review.

3. In the **Manager Objectives** and **Career Growth Objectives** sections, modify or add objectives, milestones, and weights as appropriate.

4. Once you have finished reviewing the form and made any necessary changes, go to the bottom of the form to the section entitled, **Appraising Manager– Confirm Objectives Reviewed**, to indicate to your reporting manager that you have finished reviewing the form.

Appraising Manager –Confirm Objectives Reviewed

☑ By checking here, you are confirming that you have reviewed the form and are ready to proceed to the progress review stage.

5. Click on the save and close ⎢Save and Close⎥ at the bottom of the form or click on save icon 🖫 at the top of the form.

6. At the top of the form (under the **route map)** or at the bottom of the form, click on the **DONE** ⮕ DONE! button to close the Planning Stage.

7. A new window opens. In text box, enter any comments to be included in an email that will be sent to your reporting manager. These comments will not appear on the form. Below the comments window click on the **DONE** button. The form will now be in progress review stage where it remains until progress reviews begin in March of 2013. Your reporting manager will receive an email notification indicating that the planning stage has been completed.

   If in the process of completing the above step you realize you need to re-access the form, click on **Cancel & Return to Form** button to cancel moving the form to Progress Review stage.

Job Aid for 2013 Planning Stage

DONE!
You're about to send this form to the next person(s) specified in the workflow.
Forward Form to Progress Review
Comments by Mark Lancaster
[text area]
Comments provided here will be included in email notification(s).
DONE! ⬅ By clicking the Done! button, objectives have been agreed upon between the Reporting and Appraising Manager. This confirms that you are now exiting the Planning stage.
or   Cancel & Return to Form

System Features:

- **Cascading Feature.** This feature allows managers to cascade both **Manager Objectives** and **Career Growth Objectives** to their direct reports as well as to other individuals in an Agency/Secretariat. If your Agency/Secretariat has opted to use the Cascading Feature please refer to the Cascading Job Aid (instead of this Planning Stage job aid). You can check with your Agency ACES Coordinator whether your agency will be utilizing the cascading feature.

- **Goal Library – Career Growth Objectives.** Managers can click on the **Goal Library** where there are sample Career Growth Objectives they may wish to add to their forms. Managers will then be able to tailor these objectives to their positions as needed. Similar to previous years a goal library is also available in the Manager Objectives section.

- **Copy 2012 ACES objectives onto 2013 form.** To access your 2012 form to copy and paste objectives into your 2013 form, click on the star **Form history** icon in upper right corner. Select "include in-progress documents" box if your 2012 form is not in the list.

- **Collaborative Process.** The form is simultaneously sitting in the inbox of the reporting manager and the appraising manager for the Planning, Progress Review and Final Review stages. When the form goes into ACES Coordinator and Signature stages, it routes from one inbox to the next following an iterative process.

- **Form Simultaneously in Two Inboxes at Same Time.** The form is simultaneously in the inbox of the reporting manager and the appraising manager for the Planning, Progress Review and Final Review stages. Therefore, only one person can be editing the form at a given time. When the form goes into ACES Coordinator and Signature stages, it routes from one inbox to the next following an iterative process. You will receive an error message indicating that the document is currently being locked by another user for edit and to try again later.

- **High Level Instructions for Each Section.** For each ACES phase detailed instructions have been provided at the top of each form that describe the steps needed to be completed for each stage.

- **Employee Performance Review System Completion (EPRS) Checkbox.** During the final review stage, the reporting manager selects this checkbox to indicate that the EPRS review process is completed for his/her non-management direct reports (if applicable).

- **Reviewing Manager Role.** Through dashboard reports, the reviewing manager can view the evaluation forms of his/her direct reports and their managers (if applicable).

Job Aid for 2013 Planning Stage

Technical Tips

□ **Timeout Message - Save your work every 10 minutes!** Your ACES Online session will time-out after 30 minutes of inactivity. **Since text entry is not registered by the system as activity, be sure to save your work by clicking on the save icon in the upper right corner of the form every 10 minutes.** Clicking **OK** on the session expire message will re-start the 30-minute clock for timeout purposes, but will not save your work on the form.

□ **Forgot Your Password?** If you forget your password, go to the ACES Login page at https://performancemanager4.successfactors.com/login?company=MA&, click on "Forgot Your Password?" link, enter your Employee ID and click on "Email Me". The system will reset your password to a system-generated password. Upon logging in, you will be required to choose a new password by first entering your system generated password and then entering your new password twice.

□ **Did Not Receive Email or is Your Account Locked?** Notify your Agency ACES Coordinator if you do not receive your login information. If you've tried logging on too many times with the wrong password, your account gets locked. Your Agency ACES Coordinator can unlock your account.

□ **Screen resolution:** The recommended screen resolution to maximize the amount of the form displaying on the screen while minimizing scrolling is 1024x768. You can change this resolution in your control panel on your computer under settings, display options. Consult your IT unit for technical assistance.